

FAFSA SIMPLIFICATION IMPLEMENTATION SCHOOL CHECKLIST

GAIN FAMILIARITY WITH FAFSA SIMPLIFICATION ACT

Resource(s)	Task	Completed?	Recommended Timeline
Legislative text	Read FAFSA Simplification Act and Technical Amendments to FAFSA Simplification Act	<input type="checkbox"/>	ASAP
NASFAA FAFSA Simplification web center	Read/review NASFAA summaries of legislative changes	<input type="checkbox"/>	ASAP
DCL GEN-22-15	Read Department of Education guidance on implementing FAFSA Simplification Act provisions	<input type="checkbox"/>	ASAP when issued
Not yet published	Read Student Aid Index Formula Guide	<input type="checkbox"/>	ASAP when issued

Institutional notes:

ESTIMATE INSTITUTIONAL BUDGET IMPACT OF PELL GRANT AND EFC (SAI) CHANGES

Resource(s)	Task	Completed?	Recommended Timeline
SAI Modeling Tool	Use SAI modeling tool to estimate institutional budget impacts from: <ul style="list-style-type: none"> • Changes to Pell grant recipients • Changes to Pell grant amounts • Changes to SAI vs EFC 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	At least 2 months before 2024-25 financial aid budget decisions are made
SAI Modeling Tool	Use SAI modeling tool to estimate impacts of FAFSA Simplification on state grants and how that may impact your students' need/institutional budget	<input type="checkbox"/>	At least 2 months before 2024-25 financial aid budget decisions are made
SAI Modeling Tool	Use SAI modeling tool to inform institutional packaging decisions to hold harmless* certain populations impacted by formula changes: <ul style="list-style-type: none"> • Treatment of more than one student enrolled in college • Treatment of small businesses/farms • Treatment of untaxed income • Treatment of significant differences between SAI and EFC <p><i>*note that use of the new formula will be mandatory for 2024-25 for federal student aid, but that institutions might opt to use a different methodology for institutional funds to mitigate the impact of changes on continuing students.</i></p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	At least 2 months before 2024-25 financial aid budget decisions are made

- Make budget decisions about impacts of new SAI formula
- Replacing lost Pell grants with institutional dollars
- Replacing lost state grants with institutional dollars
- SEOG packaging parameters

At least 2 months before 2024-25 financial aid budget decisions are made

Institutional notes:

COST OF ATTENDANCE CHANGES

Resource(s)	Task	Completed?	Recommended Timeline
NASFAA Summary of FAFSA Simplification Changes DCL GEN-22-15	Update COA food allowance to provide for 3 meals/day	<input type="checkbox"/>	ASAP
NASFAA Summary of FAFSA Simplification Changes DCL GEN-22-15	Update COA to include cost of first professional credential <ul style="list-style-type: none"> • If offering programs that lead to professional credential, add cost of first professional credential to COA <ul style="list-style-type: none"> o Decide if will allow this cost to be added to the COA more than once 	<input type="checkbox"/>	ASAP
NASFAA Summary of FAFSA Simplification Changes DCL GEN-22-15	Decide if will allow cost of computer for < ½ time students	<input type="checkbox"/>	ASAP
NASFAA Summary of FAFSA Simplification Changes DCL GEN-22-15	Update on-campus housing COA component using separate allowance for students with dependents and students without dependents based on the greater of the average or median amount assessed to those students	<input type="checkbox"/>	ASAP
NASFAA Summary of FAFSA Simplification Changes DCL GEN-22-15	Update loan fees allowance to permit only federal loan fees	<input type="checkbox"/>	ASAP
	Estimate total institutional budget impact from COA changes arising from FAFSA Simplification Act	<input type="checkbox"/>	After completing all steps in this section

Institutional notes:

ENGAGE CAMPUS STAKEHOLDERS

Resource(s)	Task	Completed?	Recommended Timeline
	Financial aid budget decision makers (to ensure any newly identified budget needs are accounted for)	<input type="checkbox"/>	After completing steps in "Estimate Institutional Budget Impact of FAFSA Simplification Provisions" section
	Enrollment Management Team and 3rd Party Vendor(s) (to determine leveraging and monitor impacts on institutional aid budget, discount rate and headcount priorities)	<input type="checkbox"/>	ASAP
	Information Technology (to implement campus systems changes necessitated by FAFSA simplification changes)	<input type="checkbox"/>	ASAP
	Other offices that rely on Pell receipt status, EFC, or other FAFSA data for eligibility for programs they oversee:	<input type="checkbox"/>	Summer 2023 or earlier
	• Development/advancement to discuss Pell grant/EFC priorities for receipt of institutional aid	<input type="checkbox"/>	
	• Residence life to discuss housing over breaks based on Pell receipt or SAI?	<input type="checkbox"/>	
	• Food bank/diaper bank to discuss whether Pell receipt or SAI is used to determine eligibility	<input type="checkbox"/>	
	• Basic needs/Single Stop office to address possibility of changes to numbers of Pell grant recipients and EFCs	<input type="checkbox"/>	
	• Emergency aid office to discuss Pell grant/EFC priorities for receipt of emergency aid (lower SAIs and more Pell grant recipients may mean need for more emergency aid dollars or refining eligibility criteria for emergency aid)	<input type="checkbox"/>	
	• Office(s) that have programming for low-income/first generation students that conditions eligibility on Pell receipt status/EFC	<input type="checkbox"/>	
	• Admissions to discuss current or future outreach to Pell eligible or low EFC students	<input type="checkbox"/>	
	• Unaccompanied youth/homeless liaison to discuss changes to unaccompanied/homeless youth documentation changes	<input type="checkbox"/>	

Institutional notes:

ENGAGE EXTERNAL STAKEHOLDERS

Resource(s)	Task	Completed?	Recommended Timeline
	Financial aid software providers (FAMs) to ensure preparation for FAFSA Simplification Act provisions	<input type="checkbox"/>	ASAP
	State scholarship agencies to discuss changes to student eligibility as a result of FAFSA Simplification Act provisions	<input type="checkbox"/>	ASAP
	Scholarship partners to discuss changes to student eligibility as a result of FAFSA Simplification Act provisions	<input type="checkbox"/>	ASAP
	Promise programs to discuss changes to student eligibility as a result of FAFSA Simplification Act provisions	<input type="checkbox"/>	ASAP

Institutional notes:

UPDATE POLICIES AND PROCEDURES

Resource(s)	Task	Completed?	Recommended Timeline
NASFAA P&P Builder	Update P&P manual for changes to: <ul style="list-style-type: none"> • Treatment of more than one in student enrolled in college • Treatment of small businesses/farms • Treatment of students with other family members in college • Replacing lost Pell grants with institutional dollars • Replacing lost state grants with institutional dollars • SEOG awarding guidelines 	<input type="checkbox"/>	When developing 2024-25 packaging policies
DCL GEN-22-15	<ul style="list-style-type: none"> • COA <ul style="list-style-type: none"> o Cost of first professional credential no longer limited to one-time o Computer cost for < ½ time students o Private loan fees no longer permitted in COA 	<input type="checkbox"/>	ASAP

DCL GEN-22-15	<ul style="list-style-type: none"> • PJ/dependency overrides <ul style="list-style-type: none"> o Remove policy of denying all PJ requests if you have one o Provisional independent student status o New criteria that are considered special circumstances meriting a dependency override o Decide if want to adopt policy of setting income to zero w/ documentation of unemployment benefits during periods of disaster, emergency, or economic downturn 	<input type="checkbox"/>	ASAP
DCL GEN-22-15	<ul style="list-style-type: none"> • Expanded list of acceptable documentation for unaccompanied/homeless youth 	<input type="checkbox"/>	ASAP
DCL GEN-22-15	<ul style="list-style-type: none"> • Carrying forward dependency status override from one year to the next 	<input type="checkbox"/>	ASAP

Institutional notes:

COMMUNICATIONS/OUTREACH

Resource(s)	Task	Completed?	Recommended Timeline
	Update financial aid night materials (such as determining which parent's data to report on FAFSA, how to determine household size)	<input type="checkbox"/>	Summer 2023 or earlier
	Update website/written materials <ul style="list-style-type: none"> • Remove references to EFC & replace with SAI 	<input type="checkbox"/>	By October 1, 2023
DCL GEN-22-15	<ul style="list-style-type: none"> • Publicize availability of PJ to comply with new statutory requirement 	<input type="checkbox"/>	ASAP
DCL GEN-22-15	<ul style="list-style-type: none"> • Remove references to any policy of not processing PJ requests to comply with new statutory requirement 	<input type="checkbox"/>	ASAP
DCL GEN-22-15	<ul style="list-style-type: none"> • Update PJ policies 	<input type="checkbox"/>	ASAP
	<ul style="list-style-type: none"> • Update Year Round Pell information to reflect that students no longer have to be enrolled at least half-time in the term they receive the additional Pell grant 	<input type="checkbox"/>	By October 1, 2023
	<ul style="list-style-type: none"> • Update Pell proration information 	<input type="checkbox"/>	By October 1, 2023
	<ul style="list-style-type: none"> • Update information on how to determine who is the student's parent on the FAFSA 	<input type="checkbox"/>	By October 1, 2023
	<ul style="list-style-type: none"> • Update information on how to determine family size 	<input type="checkbox"/>	By October 1, 2023
DCL GEN-22-15	<ul style="list-style-type: none"> • List all COA components on all websites that list costs to comply with new statutory requirement 	<input type="checkbox"/>	ASAP

DCL GEN-22-15	<ul style="list-style-type: none"> Update COA references to reflect legislative changes and institutional policy changes for: <ul style="list-style-type: none"> Cost of first professional credential Computer cost for < 1/2 time students Private loan fees 	<input type="checkbox"/>	ASAP
	<ul style="list-style-type: none"> Remove references to requirement to register with Selective Service System, SULA, and drug conviction eligibility restriction 	<input type="checkbox"/>	ASAP
	Conduct preemptive outreach to students who could be negatively impacted by FAFSA Simplification Act changes (such as those with > 1 family member in college, small business and farm owners); note whether any institutional decisions to grandfather eligibility might mitigate impacts	<input type="checkbox"/>	ASAP
	Update Net Price Calculator to incorporate changes to Pell grant eligibility formula and EFC (SAI)	<input type="checkbox"/>	At the time you normally update the NPC for the next award year

Institutional notes:

TRAINING

Resource(s)	Task	Completed?	Recommended Timeline
NASFAA FAFSA Simplification web center DCL GEN-22-15	Train staff on provisions of FAFSA Simplification Act	<input type="checkbox"/>	ASAP
	Train staff on Policy & Procedure changes	<input type="checkbox"/>	Before 2024-25 application cycle begins

Institutional notes:

The National Association of Student Financial Aid Administrators (NASFAA) provides professional development for financial aid administrators; advocates for public policies that increase student access and success; serves as a forum on student financial aid issues; and is committed to diversity throughout all activities.

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